	客戶信息 表 **Tax-Aid Questionnaire** **CHINESE / ENGLISH**
Tax-Aid Use Only Volunteer Screener Name:_____ Did you check client photo ID and SSN/ITIN? Y/N Preparer Name/Laptop Number: _____ Reviewer Name:_____ Return Level (circle one): 1, 2 or 3 Site Manager circle one: Efile or Paper Client #: _____ Entered in Tax-Aid client tracker? Y/N	说明指南：請填寫 1-13 頁並返還給 Tax-Aid Instructions: Complete pages 1-13 and return to Tax-Aid 圈出所有适用的税务年份 Tax return years you need prepared. Circle all that apply. 2022, 2021, 2019, 2018, 2017. 其他年份，填在这里 For additional years, enter here: _____ Preferred Language偏好语言:_____

第1部分: 您的信息: (請對以下的問題圈出"是"或 "否")

Part 1: Your Information: Please Check Your Answers to Yes/No Questions

你去年报税了吗？ Did you file your tax return last year?	是/Yes	否/No
Tax-Aid有幫助你準備去年的報稅嗎？ Did Tax-Aid prepare your taxes?	是/Yes	否/No
您今年是否已完成報稅？ Have you already filed a tax return this year?	是/Yes	否/No
您或您的配偶有沒有收到国税局或州税局的信件？ Have you or your spouse received any letters from the IRS or State FTB?	是/Yes	否/No

纳税人姓名/ Taxpayer's name

您的名字/First _____中間名縮寫/Middle_____姓氏/Last_____

配偶名字/Spouse's name

您的名字/First_____中間名縮寫/Middle_____姓氏/Last _____

个人信息/Personal Information	纳税人 Taxpayer	配偶 Spouse
社会安全號碼 Social Security Number		
你有 ITIN 號嗎? 请填写。 If you have an Individual Identification Number (ITIN), please list it		
电话号码 Cell Phone Number		
你的电子邮件 Email Address		

个人信息/Personal Information	纳税人 Taxpayer	配偶 Spouse
出生日期(月/日/年) Birth Date (Month/Day/Year)	___/___/_____	___/___/_____
您是否為美國公民? Are you a U.S. citizen? ☐ (如果入籍请勾选) 如果您入籍, 请勾选此框 Check the box if naturalized	是/Yes 否/No	是/Yes 否/No
您是否為全職學生? Are you a full-time student?	是/Yes 否/No	是/Yes 否/No
您是否在其他報稅表 上被列為親屬列入您父母的表? Are you claimed as a dependent on another person's tax return such as your parent?	是/Yes 否/No	是/Yes 否/No
你是否法定失明? Are you legally blind?	是/Yes 否/No	是/Yes 否/No
去年起, 您是否為永久殘障? Last year, were you permanently disabled?	是/Yes 否/No	是/Yes 否/No
您的家庭电话号码 Home Phone		
家庭地址 Home address		
城市、州名、邮政编码#、公寓 # City, State, Zip Code, Apt./Unit		

就业信息Employment Information	纳税人 Taxpayer	配偶 Spouse
你的工作/职务是什么？ What is your job?		
雇主名称 Your employer(s)		
你在那里工作多久了？ How long have you worked there?		
你的雇主是怎么付工资给你的？（每月，每周，现金） How are you paid (monthly, weekly, cash)?		

第2部分- 您用何種身份報税?/ Part 2 – How are you filing?

單身(包括已註冊的伴侣關係或州法承認的其他正式關係)

☐ **Single** (including registered domestic partnerships, civil unions, or other formal relationships under state law)

已婚，但分開報税 / ☐ **Married filing separately** [2]

最终离婚判决书日期，或分居扶养协议日期 _____

⇒ Date of final decree or separate maintenance agreement

已婚，共同报税 / ☐ **Married filing jointly**

否婚姻是否被您所報税的州承認？

⇒ Was your marriage recognized under state law for the state(s) you are filing in? 是/Yes 否/No

你在2022年结婚了吗?/ ⇒ Did you get married in 2022 是/Yes 否/No

單身，但有撫養其他人 / ☐ **Head of Household** 是/Yes 否/No

在 过去 6 个月，您的配偶曾否与您同住？

☐ Did your spouse live with you during any part of the last six months of the tax year?

是/Yes 否/No

有受抚养子女的合格鳏夫 是/Yes 否/No

☐ **Qualifying Widow(er) With Dependent Child**

配偶死亡年份 _____

Year of spouse's death

如果您 /您的配偶是身份盗窃的受害者，并从国税局获得了电子申请PIN 码，那么 PIN 码是什么?
If you/your spouse were a victim(s) of identity theft and received an e-filing PIN from the IRS, what is the PIN?

電子申請 IP PIN/E-Filing IP PIN	纳税人 Taxpayer	配偶 Spouse
身份保護 IP PIN 码 / IP PIN #		
身份證明种类 / Type of ID		
身份證明號碼ID #: ID #		
頒發州/State ID issued		
頒發日期/ Issue date		
失效日期/Expiration date		

收到退税的最快方式是通过直接存款。 如果您希望直接存款用于退税，请在下方列出您的银行信息。
The fastest way to receive your tax refund is by Direct Deposit. If you want Direct Deposit for your tax refund, list your banking information below.

銀行名稱/Bank name:_____

匯款路線號碼 / Routing number:_____

銀行帳號 / Account number :_____

帐户类型/Type of account ____ 活期/ Checking ____儲蓄/ Savings

第 3 部分 被抚养人/Part 3 Dependents – 如没有被抚养人，跳至第4部分if no dependents, skip to Part 4

您或您的配偶是否曾經領養過小孩?/Have you or your spouse adopted a child? 是/Yes 否/No

被撫養 人的名字 (名，中間名缩寫，姓氏) Dependent's Full Name (First, Middle Initial, Last)	出生日期 Date of Birth (mm/dd/yyyy)	美国公民（是/否） US Citizen	去年居住在美国、加拿大或墨西哥（是/否） Lived in US/Canada/ Mexico in 2022	社会保障号码 Social Security Number or ITIN	与纳税人同住的月数 # months lived with payer	是否為全職 学生？ Full time student?	與您的關係 (儿子，女儿，etc.) Relationship (son, daughter, etc.)	永久残疾？ Totally and permanently disabled
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No
		是/Yes 否/No	是/Yes 否/No			是/Yes 否/No		是/Yes 否/No

第 4 部分 - 去年，您、您的配偶或您所有的受抚养人是否……
Part 4 - Did You or Your Spouse or Your Dependent.....

1. 您、您的配偶和所有受抚养人是否有全年的健康保险？ Do you, your spouse and your dependent have health insurance for the entire tax year?	是/Yes 否/No
2. 收到一份或多份此类表格？ Did you receive one or more of the following forms? (please check the boxes) （勾选方框） ☐ **1095-B** ☐ **1095-C**	是/Yes 否/No
3. 通过市场（交易所）或加州 3895 表格获得保障？ Did you get your insurance from Marketplace or receive Form **1095-A** and California Form **3895**?	是/Yes 否/No
a. 如果是，请从 Marketplace 收到预付款以帮助支付您的月度费用 If yes, did you receive an advanced payment from Marketplace to help to pay your monthly premium	是/Yes 否/No
b. 如果是，您的 1095-A 表格中列出的每个人是否都在此纳税申报表中申报？ If yes, is everyone listed in your Form 1095-A reported in this tax return?	是/Yes 否/No
4. 有 Marketplace 授予的豁免吗？ Do you have an exemption from the Marketplace?	

第 4 部分- 您或您的配偶是否收到... ?/ Part 4 A - Did You or Your Spouse Receive...?	
1. 工資 (W-2) Wages (W-2) 1a. 圈出您收到的 W2 数量：到五个 六个或更多 1-5 6 或更多 1a. Circle the number W2s you have 1-5 6 or more[2]	是/Yes 否/No
2. 您是否为居家支持服务(IHSS)工作过？Did you work for In Home Support Services (IHSS)	是/Yes 否/No
2a. 如果是，您是否和您居家支持服务的对象居住在一起？If you answered yes to question 2, do you live in the same residence with the person you provide In Home Support Services to?	是/Yes 否/No
3. 小費 / Tips 如果是，你收到了多少钱？ _____ If yes, how much did you receive?	是/Yes 否/No
4. 奖学金 (1098-T) Scholarships[2] (1098-T)	是/Yes 否/No
5. 银行利息 / 股票利息 (1099-INT, 1099-DIV) Interest/dividends[2] (1099-INT, 1099-DIV)	是/Yes 否/No
6. 州退税 (1099-G) State/local tax refund (1099-G)	是/Yes 否/No
7. 贍养费 Alimony income or separate maintenance payments 离婚协议日期Date of decree_____	是/Yes 否/No
8. 現金或自雇收入 (1099-MISC, 1099-NEC, Cash) Self-employment income (1099-MISC, 1099-NEC, Cash)	是/Yes 否/No
9. 工作收入没有申报在 W-2/1099 Income for work not reported[2] on Forms W-2/1099	是/Yes 否/No
10. 您收到 1099-K 了吗？ 以换取您提供的任何服务和商品？ Did you receive 1099-K in exchange for performing any services and goods?	是/Yes 否/No
10a. 您为什么收到 1099-K？ Why did you receive 1099-K?	是/Yes 否/No
11. 你在加州以外賺取收入吗？ Did you earn income outside California?	是/Yes 否/No
12. 買賣股票/ 債券/ 房地產(1099-S, 1099-B) Transactions of stocks[2] /bonds /real estate (1099-S, 1099-B)	是/Yes 否/No
13. 殘障收入保險賠款/職業傷害賠償 Disability income[2] (insurance/workers comp) (Forms 1099 R, W-2)	是/Yes 否/No

14.養老金/退休金/年金/個人退休帳戶提款(1099-R) Pension[2],annuity, IRA distributions (1099-R)	是/Yes 否/No
15. 您是否因為疫情從个人退休金或其他养老金账户取出資金? Did you withdraw from your IRA[2] or other retirement accounts?	是/Yes 否/No
15a. 如果是，请圈出取出资金的理由：If you answered Yes to question 15, please circle the reason for withdrawal: 新冠COVID-19 正常取出Normal Distribution (最低要求取出或转如其他养老金RMD or Rollover of Other (请列明please write in)_____	
16. 失業救濟金 (Form 1099-G) Unemployment compensation(Form 1099-G)	是/Yes 否/No
17. 社會安全福利金/鐵路退休員工福利金 (SSA-1099, RRB-1099) Social Security, Railroad (SSA-1099, RRB-1099)	是/Yes 否/No
18. 物业出租盈利或虧損 Income (or loss) from rental property	是/Yes 否/No
19. 其他收入(博彩/彩票, 奖品奖项, 陪审团职责, 时间表 K-1 等) Other income[2] (gambling/lottery, prizes/awards, jury duty, Schedule K-1, etc.)	是/Yes 否/No
20.您是否在2022 年有購買或拋售任何加密貨幣（例如比特幣） ? Have you purchased and/or sold any cryptocurrency[3] (example bitcoin) (勾选方框) ☐ 出售加密货币 ☐ 购买加密货币 (Check the box) ☐ Sold cryptocurrency ☐ Purchased cryptocurrency 或其他虚拟资产（如NFT非同质化代币）Or any other digital assets (example Non Fungible Token)	是/Yes 否/No
21. 您是否在 2022年收到任何加密貨幣（例如比特幣）以換取任何服務？ Have you received any cryptocurrency[3] (example, bitcoin) in exchange for performing any services?	是/Yes 否/No
22. 您收到加州金州經濟刺激付款了嗎？ 你收到了多少 _____? Did you receive the Middle Class Tax Refund?	是/Yes 否/No

第 4B 部分- 您或您的配偶是否付款...? Part 4B - Did You or Your Spouse Pay...?	
1. 租金 Rent (您可能符合加州租房者补贴you could qualify for the California Renter's Credit)	是/Yes 否/No
2. 你所租住的住處是否被定為政府協助類的房屋？ Was your home rental considered subsidized housing?	是/Yes 否/No
3. 贍養費 Alimony or separate maintenance payments 离婚协议日期Date of decree: _____	是/Yes 否/No
4. 退休户口供款 Contributions to a retirement[2] account	是/Yes 否/No
5. 高等學院学费 (1098-T) Post-secondary education[2] expenses	是/Yes 否/No
6. 自付医疗费用 Medical[2] expenses	是/Yes 否/No
7. 房屋贷款利息 (1098) Home mortgage[3] interest (1098)	是/Yes 否/No
8. 学生贷款利息 (Form 1098-E) Student[2] loan interest (Form 1098-E)	是/Yes 否/No
9. 物业税 / 個人資產稅 (1098) Real estate[2] taxes or personal property taxes (1098)	是/Yes 否/No
10. 慈善捐款 Charitable contributions 10a.捐款金额 $_____ Amount of contributions $ 10b. 你所付的資金形式是什麼？現金，信用卡，或支票？ How was this contribution made (circle all that apply) Cash/Check /Credit Card	是/Yes 否/No
11. 日間托兒費 Child or dependent care expenses[2] such as daycare	是/Yes 否/No
12. 教師的教育用品支出 For supplies as an educator (i.e.,teacher, teacher's aide, counselor, etc.)	是/Yes 否/No
13. 与自 雇 收入 / 其他收入相关的支出 Expenses related to self-employment[2] income or any other income you received 圈出您的支出数量：▪ 一到五个 ▪ 六点到九点 ▪ 十个或更多[3] Circle the number of expenses you had: 1-5, 6-9[2] , more than 10[3] 请参考Uber-Lyft"共享经济"费用 https://tinyurl.com/4sujn3je	是/Yes 否/No

第 4C 部分- 你有没有… Part 4C - Did you have...	
1. 保健储蓄账户(5498-SA, 1099-SA) Health[2] Savings Account (5498-SA, 1099-SA, W2 with Code W in box 12)	是/Yes 否/No
2. 債務 取消 /赦免 (1099-C, 1099-A) Have debt cancelled[2]/forgiven/credit card/mortgage(1099-C, 1099-A)	是/Yes 否/No
3. 買 / 賣 / 法拍 你的物业 (Form 1099-A) Buy, sell, foreclose (COD) your home[2] (1099-A)	是/Yes 否/No
4. 前一年是否不允許獲得收入抵免 (EIC) 或兒童稅收抵免 (CTC) ？ 哪一年 您是否收到預付兒童稅收抵免？ _____ Have Earned Income Credit (EIC) or Child Tax Credit (CTC) disallowed a prior year[2]? Which year?	是/Yes 否/No
5. 裝高效節能家用物品（如窗戶等） 你付了多少钱？_____ Purchase/install energy-efficient home items[2] (such as windows, etc.) How much did you pay?	是/Yes 否/No
6. 您是否生活在受自然災害的地 Live in an area that was affected by a natural disaster? 6a. 如是，則哪裡？_____ If so where?	是/Yes 否/No
7. 年的預估納稅額 您支付了多少？_____ Estimated[2] tax payments for 2022? 4/15支付了多少How much did you pay 4/15 $_____ 6/15 支付了多少How much did you pay 6/15 $_____ 9/15支付了多少How much did you pay 9/15 $_____ 1/15支付了多少How much did you pay 1/15 $_____	是/Yes 否/No
8. 您是否有 "資本損失結轉"(F1040 附表 D)[3] A "capital loss carryover" (on Form 1040 Schedule D)[3]	是/Yes 否/No
9. 在 2008 年获得首次购房者信贷？（$7500免息贷款） Did you receive First Time Homebuyers Credit in 2008? (interest free $7500 loan)	是/Yes 否/No

Tax-Aid透過補助金和捐款來經營我們免 費的稅收據點。以下選項將會被用於申請補助金和做為統計目的。
Tax–Aid depends on grants and contributions to operate our free tax sites. The data from the following optional questions may be used to apply for these grants and for statistical purposes.

1. 種族 / Ethnicity: 請選擇所有適用選項 / check all that apply:

☐ 非裔 美國人/黑人	☐ African American/Black
☐ 拉丁裔	☐ Latinx
☐ 北美人	☐ North American
☐ 中美洲人	☐ Central American
☐ 亞洲人	☐ Asian
☐ 美國原住民	☐ Native American
☐ 白人	☐ Caucasian/White
☐ 夏威夷原住	☐ Native Hawaiian/Pacific Islander
☐ 其他: _____	☐ Other
☐ 宁愿不回答	☐ Prefer not to answer

2. 您的性别是? （請選擇最能描述您當前性別身份的選項）
What is your gender? (Check the one that best describes your current gender identity)

☐ 女人	☐ Female
☐ 男人	☐ Male
☐ 变性女人	☐ Transgender Female
☐ 变性男人	☐ Transgender Male
☐ 性别酷兒	☐ Gender Queer
☐ 其他_____	☐ Other
☐ 不方便回應	☐ Prefer not to answer

3. 您或您的任何家庭成員有殘疾嗎？
Do you or any member of your household have a disability?

是/Yes 否/No
不方便回應
Prefer not to answer

4. 您或您的配偶是美國的退伍軍人嗎？
Are you or your spouse a Veteran from the U.S. Armed Forces

是/Yes 否/No
不方便回應
Prefer not to answer

5. 你是怎麼知道我們的？/ How did you hear about us?

Tax-Aid 做了我之前的回報
Tax-Aid did my return before — 是/Yes 否/No

互聯網搜索
Internet search — 是/Yes 否/No

另一個非營利組織
Another nonprofit — 是/Yes 否/No

家人或朋友
Family or friend — 是/Yes 否/No

其他（請填寫） _____
Other (please write in)

INCOME SUMMARY FOR TAX AID USE ONLY			
Taxable Income		**Non-Taxable Income**	
Wages (W-2/1099)		SSA/SSI	
Interest/Dividends		AFDC	
Schedule C		Gen. Asst	
IRA/401(k)/Pension		Other	
TOTAL INCOME			
Is the taxpayer below our **$60,000** gross income (taxable) requirement?		Yes/是 No/否	
Does the taxpayer **NEED** to file a return?		Yes/是 No/否	
Remember to indicate direct deposit info on both federal and state			
Withholding		Earned Income Credit	
Estimated Tax Payments		Renter's Credit	
Direct Deposit Verified		Client Renumbered?	
EFile?		Critical Diagnostics cleared?	
ERO PIN? Yes / No			

信息披露協議

泄露或使用您的個人身份信息，包括社會安全號碼，ITIN（納稅者身份號），出生日期，报税信息 或 其他個人財務信息。我們將只使用您的联络信息，用于通知您其他可能使您受益服務。您的信息将与数 千名 从我们这里得到服务的报税人的信息汇总在 一起，汇总信息将以如下形式出现在各种可能的共享 场 合 ：

*Tax-Aid **2022** Results*
***1,557** tax returns*
$1,516,962** million in total refund**s

以下人士、團體或組織可能獲得汇总數據：

- □ 免費稅務籌劃方案的捐助者和志願者
- □ 若干媒體合作夥伴
- □ 民選官員和其他組織的支持者
- □ 一般民眾

披露信息授权

按聯邦法律的規定，我们应向您提供此授权表格。除非得到法律的授權，未經您的同意，我們不能将您的报税 信息 向与报税无关的第三方披露。如果您授权披露您的报税信息，联邦法律将不再保护您的报税信息免于被 进 步 一 使 用 或扩散。您并不是必须填寫此表格。如果您的签字授权是有条件的，那么授权将被视为無效。您 可以指定授权的有 效期，如果您 不指定時間，那么有效期将被默认為 年一 。如果您認為，在未经法律授权也 未经您授权的情况下，您 的报税信息被泄露或被不正当地使用了，您可以考虑通过電話或電子郵件聯繫財政 部稅務總局監察長（TIGTA）， 电话： 1866-366-4484，电子邮件：**complaints@tigta.treas.gov**

是的，我同意我的報稅信息与上述人士、團體或組織共享

不，我不同意我的報稅信息与上述人士、團體或組織共享 organizations

姓名 日期 _____

簽名 配偶簽名 _____

注：此文件为翻译件，若出现歧义，请以原文为准。_____

Taxpayer Agreement to Disclose

We **will not** share or use personal identifying information including your social security number, ITIN, date of birth, refunds, or personal financial information. We will only use your contact information to inform you of other services that may benefit you. We will use and keep your data combined with THOUSANDS of other taxpayers for the duration of the free tax preparation program to share results like this:

Tax-Aid **2022** Results
1,557 tax returns
$1,516,962 million in total refunds

The following persons, groups, or organizations receive the combined data results:

- Free tax preparation program donors and volunteers
- Various media partners
- Elected officials and other program supporters
- General public

Consent to Disclose

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose, without your consent, your tax return information to third parties for purposes other than the preparation and filing of your tax return. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution. You are not required to complete this form. If we obtain your signature on this form by conditioning our services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year. If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the
Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at complaints@tigta.treas.gov.

- Yes, I agree to share my tax return information with the above persons, groups or organizations
- No, I do not agree to share my tax return information with the above persons, groups, or organizations

Signature _____

Spouse's Signature _____

Date _____

客户隐私声明

TAX-AID

事实真相	**税务援助如何处理您的个人信息？**
为啥?	美國聯邦法律提供消費者一些（但不是全部）權益來限制個人信息分享相關的機構決策。美國聯邦法律同時規定我們告知個人信息的收集，分享方式以及保護措施。請咨詢閱讀此聲明來更好地瞭解我們的政策。
什么？	我們收集的非公開信息都會是您個人提供的或者經您許可之後所收集。我們所收集並分享的信息類別將會根據您 所需要的具體服務。 這些信息包括： 姓名; 社會安全號碼; 個人報稅識別號碼; 住址; 出生日期; 銀行賬戶號碼; 就業單位信息; 收入與開銷; 家庭成員的姓名，出生日期，社會安全號碼與收入。 聯係方式 （電話號碼與郵件地址）
怎么样？	會計類服務公司的日常業務需要顧客個人信息。此下我們會詳細解作爲會計公司，我們機構分享個人信息的原因，以及您是否可以限制此類信息分享。如果您不再是我們的顧客，我們可以按照此聲明持續分享您的信息。

我们可以分享您的个人信息的原因	**税收援助分担吗?**	**你能限制这种分享吗?**
我們日常的業務用途— 例如，報稅 流程所需，賬戶信息所需，法令與其他法律調 所查 需， 或是給信用社的報告。	是	否
給我們內部的營銷— 爲了給您提供我們的服務	否	我们不分享
給聯合營銷的其他公司	否	我们不分享
給非附屬公司（定義在下方）的營銷	否	我们不分享

有问题吗？	您可以電話聯係 415-229-9240 或郵件 admin@tax-aid.org

我们是谁？	
谁提供此通知？	Tax-Aid
我们要做什么？	
Tax-Aid如何保护我的个人信息?	爲了保護您的個人信息並防止未經贖權的使用，我們使用符合聯邦法律規定的網絡 與系統安全機制，包括實體，電子以及程序化措施。
Tax-Aid如何收集我的个人信息？	我們會在以下情況下收集你的個人信息： • 提交報稅申請，文件; • 提交問題與其他交流； • 與我們的報稅人員合作。
为什么我不能限制所有共享？	美國聯邦法律只給予消費者權益限制機構與其他非附屬公司利用信息分享對消費者 進行營銷，具體州法律與公司政策可能給您額外信息分享的限制權利。
定义	
非附属机构	無共同所有權或掌控權的公司，無論金融公司與否。
联合市场推广	**非附屬公司之間有關於營銷產品和服務的正式合作。 Tax-Aid 不進行聯合營銷。**
其他重要资料	
N/A	

TAX-AID

CLIENT PRIVACY NOTICE

FACTS	**WHAT DOES TAX-AID DO WITH YOUR PERSONAL INFORMATION?**
WHY?	U.S. federal law provides clients with the right to limit some but not all of a company's decisions with respect to the sharing of the client's personal information. U.S. federal law also requires us to tell you how we collect, share and protect your personal information. Please read this notice carefully to understand what we do.
WHAT?	We collect nonpublic personal information about you that is either provided by you or obtained by us with your authorization. The types of personal information we collect and share depend on the particular service that we provide to you. This information can include your: name; Social Security number; Individual Taxpayer Identification Number; address; date of birth; bank account information; employment details; earnings and expenses; family members' names, dates of birth, Social Security numbers and earnings (if any); and contact information (phone number and email address).
HOW?	Accounting service companies need to share their clients' personal information to run their everyday business. In the section below, we list the reasons accounting service companies can share their clients' personal information, the reasons Tax-Aid chooses to share some of this information and whether you can limit this sharing. Once you are no longer our client, we can continue to share your information as described in this notice.

Reasons we can share your personal information	**Does Tax-Aid share?**	**Can you limit this sharing?**
For our everyday business purposes— such as to process your tax filings, maintain your account(s), respond to court orders and legal investigations, or report to credit bureaus	**Yes**	**No**
For our marketing purposes— to offer our services to you	**No**	**We don't share**
For joint marketing with other companies	**No**	**We don't share**
For Nonaffiliates (defined below) to market to you	**No**	**We don't share**

QUESTIONS?	Call us at 415-229-9240 or email us at admin@tax-aid.org

Who we are	
Who is providing this notice?	Tax-Aid
What we do	
How does Tax-Aid protect my personal information?	To protect your personal information from unauthorized access and use, we use security measures that comply with federal law. These measures include physical, electronic and procedural safeguards.
How does Tax-Aid collect my personal information?	We collect your personal information, for example, when you • submit your tax documents to us; • contact us with questions; and • work with one of our tax professionals to prepare your taxes.
Why can't I limit all sharing?	U.S. federal law gives you the right to limit only our sharing to Nonaffiliates to market to you. State laws and individual companies may give you additional rights to limit sharing.
Definitions	
Nonaffiliates	Companies not related by common ownership or control. Such companies can be financial and nonfinancial companies.
Joint marketing	A formal agreement between nonaffiliated companies that together market products or services to you. Tax-Aid does not jointly market.
Other important information	
N/A	